PURCHASING FROM A QPA OR VENDOR CATALOG

PEOPLESOFT

Menu Navigation:

- **eProcurement**
  - **Create Requisition**

A dialogue box appears displaying a **Business Unit** number and a **Requestor ID**. These will default based on the user. They may be changed if necessary. Click the **OK** button.

A new page will appear displaying options for creating the requisition. In the **Requisition Title** field, enter a description of the purchase that makes sense to you. A requisition NUMBER will be assigned automatically when the requisition is saved, and it will not be affected by the title you have chosen.

Click the **Search Catalog** link. When the Search Catalog dialogue box appears, enter a basic description of the item to be purchased in the **Search** field. Click the **Search** button (you may also use the **Advanced Search** link, and/or the **Search Tips** link if you need help).

A list of items containing the description entered in the search field will be returned, along with links to **"punch out"** catalogs that might also offer the items described (if available). Use the small **"next"** and **"previous"** arrow buttons, and the First and Last links displayed at the right corner of the list to navigate the list.

When you've found the item(s) you wish to buy, enter the quantity needed in the **Quantity** field, and click on the **Add Item** button (Green Plus Sign) to add the item(s) to your shopping cart. Do this for EACH item you wish to purchase. At the top of the page, a gray box is displayed and will indicate how much is in your shopping cart (The number of items is actually the number of requisition lines… not the actual number of items being purchased. However, the dollar amount indicated is the complete total).

When all items needed have been added to your shopping cart, click on the **Return to Summary** link in the gray box where the shopping cart information is displayed. This will take you back to the requisition, and the item(s) selected from the catalog will be displayed.

REPEAT THE PROCESS OUTLINED ABOVE BEGINNING WITH "SEARCH CATALOG" UNTIL ALL ITEMS NEEDED HAVE BEEN ADDED TO YOUR REQUISITION.

To enter the accounting information so that it will default for each line item on the Requisition, click on the **Edit Default button in the upper right side of the screen. Click on the "Override" button (**open the Ship To box so that you can select the correct Ship To location for the goods to be delivered.). **Click on the small magnifying glass next to the Ship To box.** At the next panel, **click on the Advanced Lookup link.** At the next panel **Click on the down arrow next to the Ship To Location box, select the word "contains".** To the right of that box, enter your agencies 3 digit agency number and then **click on the yellow "lookup" button.** A list of your agency Ship To locations will populate into a list that you can search to select the correct one. To select it, **click on the underlined link under Ship to Location field or the Description field.**

Scroll down to the **Distribution Default** area. Make sure that you check that the **GL Unit** matches your agency business unit number that you are entering the requisition for.
The Object Number field will default in with the object number being tied to the item that you selected when creating the QPA Release (this field will be grayed out and won't be able to be changed unless done by a **fiscal agent**). You will need to select a **Fund number** loaded for your agency, **by selecting the magnifying glass located to the right of the field. If your agency is using the AP/GL application in PeopleSoft, you will have to also select a Department ID in the field next to the Fund field.** If you are NOT using AP/GL, then you won't have to fill in this field.

Click on the More Details tab, above the GL Unit. You will need to select a **Center number** (a list that has been loaded for your agency profile) and a **Class number** (this number should be a 0 for agencies not using AP/GL). You should also select a **Budget Ref number** (which will be the fiscal 4 digit year that we are currently operating pre encumbrances from and encumbrances. Next, **click on the More Details 2 tab.** Scroll to the right on your scroll bar until you come to the **Location field.** This field is where you will enter the correct **Bill To information for the vendor to send the invoice to the agency and/or department.** Click on the small magnifying glass and then click on the **Advanced Look up link.** Go to the **Ship To Location box and click on the down arrow to select the word "contains".** To the right of the field enter the agency 3 digit number then **click on the yellow "look up" button.** This will populate a list of Bill To locations that you can select by clicking on the Ship to Location or Description line. Once this is done scroll to the left and then **click on the yellow OK button.**

At the next panel, it will show you (in the blue box area) all of the items that need to be applied to the accounting panel for all lines. If you want to mark all lines with the information, you will **click on the Mark All (blue link) at the top of the panel** (this will put a check mark in each of the small white boxes to the left of the column). Next, **Click the yellow OK button at the bottom of the panel.**

To Verify/Change ship to info, click on the **Shipping Info** (truck) icon in the item row.

To Verify/Change accounting info, click on the **Cost Distribution Info** icon available within the shipping info details.

Add line comments by clicking on the **Comments** (cloud) icon in the item row. Once the comments have been entered, **click on the "Send Comment to Vendor" box** (this will put a check mark in the box). **This is the only way that the comment will be printed out onto any associated documents contained in PeopleSoft. Click on the yellow OK button to go back to the Summary.**

Click on the **Justification/Summary** link just below the line items.

> Two new REQUIRED FIELDS appear. Your requisition will NOT save until these two fields are completed. Click on the down arrow next to the **Requisition Type** field and select **QPA** as the requisition type. Click inside the **Justification** field and enter a justification for this particular purchase.

Click on the **Return to Previous Page** link below the Justification field to return to the Requisition Summary page.

Click on the **Save for Later** button or the **Save and Submit** button.

> **The Save for Later button** will save your requisition information and automatically assign it a number. The requisition will be available through Manage Requisitions for editing or further processing.
>
> **The Save and Submit button will** save your requisition information, automatically assign it a number, and launch it into your agency's approval routing (if applicable). Once all required approvers have successfully approved the requisition, it will be available for further processing.

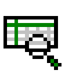
Monitor Requisition Approval Status & Run Budget Check (pre-encumbrance) Process

The "Budget Check" process (referred to as Enable Commitment Control in PS version 8.4) that creates the pre-encumbrance may be run from the Manage Requisitions page or from the Requisition Summary (requisition form). It may be run before, or after the requisition has been submitted for approvals, whichever business process works best for each agency, facility, or division. The Enable Commitment Control icon (graph paper with magnifying glass shown below) is used to initiate this process.

Requisitions must be in an "Approved" status and have a "Valid" Budget Check status before they can be sourced to purchase orders.

Menu Navigation:

- **eProcurement**
  - **Manage Requisitions**



When the **Manage Requisitions** page opens, locate your requisition by searching or sorting the list as needed.

> The list will display the "name" given to the requisition, the Business Unit, the date, the status, the dollar amount, and "budget" status (refers to the budget check status). Along with this information, a series of icons may be available identifying that more information is available or that processes may be run from this location.

Click on the **Enable Commitment Control** (Budget Check) icon (displayed above).

The budget check process will run and automatically refresh the page after completion. The column titled “Budget” corresponding to your requisition will change from “Not Chk’d” to “Valid.”

Printing a Requisition

You will need to have the Req number generated from PeopleSoft so that you can run the printing process that will allow you to pull up the information. At the Manage Requisitions panel, click on the Req Name field and it will bring up a panel that has your Requisition ID number (with zeros in front) at the top middle of the page. Write the number down, including all the zeros.

Click on Return to Manage Requisitions at the bottom of the panel.

Scroll to the bottom of the Manage Requisition column and scroll a little bit to the right of the screen. **Click on the Requisition Report link.** A new screen will pop up. Expand that window view by clicking on the white square in the upper right side of the screen. The panel should now say **Requisition Print.**

If this is the first time that you are entering the Run Control ID Name, then **click on the Add a New Value tab.** In the Run Control ID field type in PRINTREQ (make sure you don’t have any spaces or dashes in the run control set up or it will give you an error message). **Click on the yellow ADD button.**

At the next panel **enter the agency Business Unit number and the Req number (with the zeros in front).** At the Status to Include column, make sure that you **click on the Select All button and it will put a check mark in each of the boxes to the left.** In the box below the Status field, **click on the down arrow and select the option that says: “On Hold and Not On Hold”**. Scroll a little to the right and find the **yellow Run button in the upper right side of the screen and click on it.**

At the next screen, select the **Server Name (always going to be PSNT) by clicking on the down arrow. Click the yellow OK button at the bottom of the panel.** This will take you back to the Requisition Print panel, **click on the Process Monitor link in the upper right side of the screen by the Run button.**

At the next panel, your process will appear, scroll to the right and under the Run Status you will want it to say **Success. Click on the yellow Refresh button at the top every 8 seconds until it changes the Run Status to Success. Click on the Details link and then scroll to the bottom and click on the View/Log Trace link.** At the next panel there should be a **PDF file link. Click on it and it will open a Security Alert box. Click YES to bypass the security alert.** You should now be looking at a copy of the Requisition form with the information you’ve entered in PS. You should be able to print a copy from that window to your default printer.

To close the form **click on the small X in the upper right hand corner of the screen.**

Create a PO from the Requisition

Menu Navigation:

- **eProcurement**
  - **Buyer Station**
    - **Requisition Expediter**

The **Requisition Expediter** page will open, displaying fields where criteria may be entered to search for the requisition to be sourced to a purchase order. Enter the following information.

- In the **Purchase Order ID Budget Year field,** enter the last 2 digits of the fiscal year.

- If the **Business Unit** field did not appear by default or is incorrect, click on the down arrow and select the appropriate Business Unit number.

- In the **Requisition ID** field, enter the number that was auto-assigned to your requisition.

- In the **Edit Default Buyer Name field,** click on the magnifying glass to search for the appropriate buyer name, or enter it manually. (NOTE: To enter the name manually, it must be entered EXACTLY as it appears in the PS list or it will be an invalid value.)

  In the "Search by Buyer" and **"**begins with**"** fields, enter the first initial of your first name and the first two initials of your last name (in upper case). Click the **Look Up** button. Select the appropriate name from the list, and click on the Buyer Name in the left column. The name selected will populate the Buyer Name field on the Requisition Expediter page.

THE OTHER FIELDS DISPLAYED ON THIS PAGE MAY REMAIN BLANK.

- Click on the **Search** button.

  The requisition line items will populate the page.

- Click on the checkboxes in the **far-left column** to put a checkmark next to EACH LINE ITEM being awarded to the vendor.

- Click on the **Submit PO** button.

Verify Purchase Order Initiation

Menu Navigation:

- **eProcurement**
  - **Manage Requisitions**

When the **Manage Requisitions** page opens, locate your requisition by searching or sorting the list as needed. The Status column will read "PO(s) Created."

Click on the **Req. Name** link.

Once again, the requisition selected will be opened. Beneath each requisition line is a **PO Information** button (small yellow triangle).

Click on the **small yellow triangle** button to view the PO information.

The PO number, along with the PO information will be displayed. (This information is available for *each* line item by **using the PO Information button**.)

WRITE DOWN THE PO NUMBER!

Complete the Purchase Order

Menu Navigation:

- **eProcurement**
  - **Manage Purchase Orders**

The Manage Purchase Orders page will open. Find your purchase order number in the list displayed.

Use the scrollbar on the right side of the page to find the PO number in the PO Number list. (You may also use the search function at the top of the page, or sort the list of POs if needed.)

Click on the **PO number** link in the PO Number column. This will retrieve the PO form where required /optional information may be entered.

- **Header Comments**

Click on the Header Comments link at the bottom of the page to open a comment box where standard comments may be selected, or free form comments entered manually. If the comments entered or selected should appear on POs sent to vendors, click on the Send to Vendor checkbox located below the comment field.

For Standard Comments, click on the Standard Comments link within the Header Comments page. Click on the magnifying glass next to the **Std Type** field to select from the standard list. Then, click on the magnifying glass next to the **Comment ID** field to select from a list of specific comments. Once both have been selected, click the **OK button**.

Click the **OK** button on Header Comments page.

- **Line Details**

Click on the **Line Details** link if you want to document recycled content**,** US manufactured**, or** political subdivision **se** for items awarded on this PO. To record the information, click on the checkbox at the bottom right-hand corner of the panel for each line item on the PO that meets the criteria.

Click on the **OK** button.

- **Minority Business Activity**

The **Tier 2 Minority Business** tab, located at the top of the PO form, should be used if there is information to be tracked regarding contractor, sub-contractor, and/or supplier minority participation.

> Click on the **checkbox** identify the type of participation that applies (ex: **MBE, WBE, or DBE**) with a checkmark.
>
> Enter the awarded vendor's name in the **Vendor Name** field.
>
> Click on the down arrow next to the ***FIRST*** **Amt/Pct** field and select the option that applies. In the ***SECOND*** **Amt/Pct** field, enter the amount or percentage that applies.

Scroll to bottom of the page and click on the **Save** button.

Scroll to the top of the page and click the on the **PO Form** tab.

- **Header Details**

Click on the **Header Details link located at the bottom of the** PO Form **panel and identify the following.**

- Click on the magnifying glass next to the **PO Type** field and select the appropriate PO type from the list of options.
- Click on the checkbox next to **Tax Exempt** field and enter your **tax-exempt number in the ID field.**
- In the **Process Control Option section,** click on down arrow next to the **Interface** field and select **Do Not Send**.

Click the **OK** button at the bottom of the page to return to the PO Form panel, and click on the **SAVE** button at the bottom of the PO form.

Approve the Purchase Order

STOP! If the total dollar amount of the QPA release PO is under $5,000, then you can proceed to the next step and approve the purchase order. This will change the status of your purchase order, from "pending approved" to "approved".

If the total dollar amount of the QPA Release PO is over $5,000 then you will NOT be able to approve the purchase order. You will print out a copy of the QPA Release purchase order (in pending status) and you will sign the hard copy of the document and submit it to IDOA Procurement Div, QPA section. They will finalize the purchase order document in PeopleSoft and make the necessary copies and distribute to the agency, Auditor's Office, and the vendor.

Menu Navigation:

- **Purchasing**
  - **Purchase Orders**
    - **Approve Amounts**

A page will open requiring you to identify what you need to approve.

Enter the **Business Unit** and **Purchase Order** number only.

Click on the **Search** button.

A new page will open displaying information about your PO. At the top of the page, select "**Approve**" using the down arrow next to the **Approval Action** field. (This will most likely be populated correctly by default.)

Click on the **Save** button at the bottom of the page.

The Approval Status displayed at the top of the page will change to Complete when the action has been saved. You can now continue with the final purchase order steps.

Run the Budget Check Process

Menu Navigation:

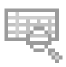
- **eProcurement**
  - **Manage Purchase Orders**

The Manage Purchase Orders page will open. Find your purchase order number in the list displayed.

Use the scrollbar on the right side of the page to find the PO number in the PO Number list. (You may also use the search function at the top of the page, or sort the list of POs if needed.)

Click on the **PO number** link in the PO Number column. This will retrieve the PO form.

The PO status, displayed just above the line items on the PO form, must be "Approved" in order to run the budget check process.



Click once on the Budget Check icon to initiate the budget check process. The icon (pictured above) is located in the upper right corner of the PO form.

Dispatch & Print the Purchase Order

Menu Navigation:

- **eProcurement**
  - **Run Purchase Order Processes**

When the PO Processes page opens, click on the link titled **Dispatch Purchase Orders**.

The Dispatch Purchase Orders page requires that a Run Control for the process be identified. Follow the appropriate procedure outlined below.

- To set up a Run Control ID the first time this process is run, click on the **Add a New Value tab**. In the **Run Control ID** field, enter **Dispatch_ PO and** click on the **Add** button.

  DO NOT USE SPACES OR PUNCTION WHEN ENTERING A RUN CONTROL.

- To select an existing run control if this is NOT the first time this process has been run, click on the **Find an Existing Value** tab. Click on the **Search** button to view a list of existing run controls, and click on the appropriate selection.

When the Dispatch Purchase Orders page opens, enter/verify the following information.

- Enter the Business Unit number in the **Business Unit** field.
- Enter the purchase order number in the **PO ID** field.
- In the **Miscellaneous Options** section on bottom right side of the page**,** click on the **Test Dispatch check**box. click the **Print Copy check**box.
- At the Number of Copies box, click on the line and delete the 1 from the box and enter a 0 on the line.

Click on the down arrow next to the **Change Orders** field and select **Changed and Unchanged Orders**.

Scroll to the top of page and click on the **Run** button located in the upper right corner**. The Process Scheduler Request page will open.**

- Click on the down arrow next to the **Server Name** field and select PSNT. The other required information at the top of this page will appear by default.
- In the **Process List** section, click on the checkbox next to **Indiana QPA Release.**

Click on the **OK** button at the bottom of the page.

The Dispatch Purchase Orders page will reopen, and a Process Instance number will be located just below the Run button indicating that the process has been initiated. To check the status of the process, click on the **Process Monitor** link next to the Run button**.**

The process monitor will display the Run Status**.** Click on the **Refresh** button in the upper right corner every six seconds or so to refresh the status of processes running, until the status changes to "Success".

Click on the **Details** link in the Details column (to the right of the Run Status column). The Process Detail page will open.

Print…

Scroll to the bottom of the page and click on the **View/Log Trace** Link in the bottom right corner.

The View/Log Trace page will display a list of available files, one of which will be in ".pdf" format. This file is the PO form, and can be printed.

Click on the file link that ends in .pdf.

Adobe Acrobat Reader will be launched, and the PO form will open. Verify that the information is correct.

Click on the Printer icon located on the toolbar to print a hard copy purchase order if needed.

Dispatch…

Return to the Dispatch Purchase Orders page.

Close the .pdf file. Click on the **Return** button at the bottom of the View Log/Trace page. Click on the **OK** button at the bottom of the Process Detail page. Click on the **Go Back to Dispatch Purchase Orders** link at the bottom of the process monitor list.

In the **Miscellaneous Options** section of the page, click on the checkbox to **REMOVE** the checkmark next to **Test Dispatch.**

Scroll to the top of the page, and click on the **Run** button.

When the Process Scheduler Request page opens, click on the **Indiana QPA Release** checkbox to select the process.

Click on the **OK** button.

The Dispatch Purchase Orders page will reopen, and a Process Instance number will be located just below the Run button indicating that the process has been initiated. To check the status of the process, click on the **Process Monitor** link next to the Run button**.**

The process monitor will display the Run Status**.** Click on the **Refresh** button in the upper right corner every six seconds or so to refresh the status of process running, until the status changes to "Success."

Verify the Purchase Order Dispatch Status

Menu Navigation:

- **eProcurement**
  - **Manage Purchase Orders**

The Manage Purchase Orders page will open. Find your purchase order number in the list displayed.

> Use the scrollbar on the right side of the page to find the PO number in the PO Number list. (You may also use the search function at the top of the page, or sort the list of POs if needed.)

The status column of the PO will now say Dispatched.